

## ROUTING AND RECORD SHEET

SUBJECT: (Optional)

WORD PROCESSING BRANCH PROCUREMENT AND INSTALLATION PROCESS

FROM:

Chief, Word Processing Branch,  
ED/ODP

EXTENSION

NO.

DATE

TO: (Officer designation, room number, and building)

DATE

RECEIVED

FORWARDED

OFFICER'S  
INITIALS

COMMENTS (Number each comment to show from whom to whom. Draw a line across column after each comment.)

1.

C/ED/ODP

12/6

p4

2.

D/ODP

12/30

J

3.

EXO

12/6

G

4.

DD

6 Dec

G

5.

D/ODP

11.1/83

J

7.

8.

9.

10.

11.

12.

13.

14.

15.

There are 32 steps which the WPB follows for the procurement and installation of a word processing system. This process does not include all tasks assigned to WPB personnel but concentrates on the administrative procedures that require coordination among the branch personnel. It is still in a state of flux (e.g., Item 12 will have to be changed since we were anticipating getting PIN numbers.)

D/ODP - 671 11/24/81  
on 11 JAN 83.  
for 1/2 hr.

WORD PROCESSING BRANCH PROCUREMENT AND INSTALLATION PROCESS

1. Systems Analysts set up folder after initial meeting with customer; FOLDER NO. is assigned; Summary Sheets are filed in folder; First Meeting date is entered on CHART.
2. Systems Analysts notify site survey personnel of need for site survey for a specific FOLDER NO.
3. Site survey personnel assist customer in drawing up blueprints (4 copies); FOLDER NO. is indicated on blueprints; one copy of blueprints is filed in folder.
4. Wang Marketing draws up Wang Cost Form including equipment and maintenance costs; copies are sent to customer and appropriate systems analyst.
5. Systems Analyst files Wang Cost Form in folder.
6. Site Survey personnel survey customer site with Wang subcontractor; site is referenced by FOLDER NO.; Site Survey Date is entered on CHART.
7. Site Survey personnel submit power request for outlying buildings and request OL to survey for HQS systems; power request dates and power installation dates are tracked.
8. Site Survey personnel notify customer of cabling costs after Wang selects subcontractor.
9. Customer draws up 88 or 2420 and mails to C/WPB/ODP. (Customer draws up a separate 2420 for cabling and sends to C/WPB/ODP.)
10. C/WPB/ODP gives 88 or 2420 to appropriate systems analyst (or site survey personnel if 2420 is for cabling).
11. Systems analyst edits 88 or 2420 checking Wang Cost Form and blueprints which should both be in folder; FOLDER NO. is penciled on 88 or 2420; copy of corrected 88 or 2420 is filed in folder. (If 88 or 2420 does not have sufficient funds it is returned to customer.).
12. Systems analyst gives 88 or 2420 to equipment tracking personnel who assigns PIN number and DCN to the 88; site survey personnel edit cabling 2420; files copy of 2420 in FOLDER and gives 2420 to equipment tracking personnel.
13. Equipment tracking personnel enters 88 or 2420 in computer database and then gives to Contracting Officer who draws up Contract Order.
14. Contracting Officer gives Contract Order to C/WPB/ODP with attached 88 (or 2420); C/WPB/ODP marks FOLDER NO. on Contract Order; C/WPB/ODP fills out approval form and gives to secretary to file.

15. C/WPB/ODP gives original copy to Contract Order to Wang Marketing and remaining copies to secretary to distribute.
16. Secretary makes two xerox copies of Contract Order and gives to C/WPB/ODP; Contract Order Number and Folder No. are entered into Word Processor file.
17. Secretary distributes copies of Contract Order to the appropriate offices; Copy 3 of Contract Order should be routed to equipment tracking personnel before filing in Contracting Officer files for entry into computer database; Secretary closes out 88 or 2420 on computer data base.
18. C/WPB/ODP gives copy of Contract Order to systems analysts who file in folder; systems analysts enter Contract Order Date and Expected Delivery Date on CHART.
19. Secretary sends 88 to OL, Supply Division; 2420 is sent to OL.
20. Site Survey personnel enter Cable Installation starting Date on CHART.
21. Site Survey personnel perform cable inspection and notify equipment tracking personnel of site readiness; site survey personnel file subcontractor's copy of blueprints in the folder.
22. Systems analysts coordinate pre-install meetings with Wang Support personnel; Pre-install Date is entered on CHART.
23. Equipment tracking personnel are notified of shipping date by Wang, Lowell and shipping date is entered on CHART; equipment tracking personnel notify customer of anticipated delivery and request to be notified when equipment is delivered; equipment tracking personnel inquire about site readiness.
24. Depot sends receiving form to equipment tracking personnel; delivered equipment data is entered into computer database; Delivery Date is entered on CHART.
25. Equipment tracking personnel give receiving form to C/WPB/ODP.
26. C/WPB/ODP gives receiving form to systems analyst who files in folder.
27. Customer contacts equipment tracking personnel about installation and equipment tracking personnel request Wang, Atlanta for installation.
28. Wang C.E.'s contact customer and arrange for installation; C.E.'s obtain blueprints from FOLDER; Wang C.E.'s install equipment and provide Installation Date and serial numbers to equipment tracking personnel who enters data into computer database; Installation Date is entered on CHART; equipment tracking personnel generate listing of equipment serial numbers for Maintenance Management Branch to tag equipment.
29. Maintenance Management Branch tags equipment.

30. Wang C.E.'s provide Acceptance Form to equipment tracking personnel who enter Begin Acceptance Date into database and on CHART.

31. Maintenance Management Branch produces reports for equipment tracking personnel to determine acceptance status; acceptance dates are entered into database and on CHART by equipment tracking personnel.

32. Equipment tracking personnel produce regular statistical reports on orders-in-process, equipment-received, maintenance record, etc.

SYSTEMS ANALYSTS

1. Set up folder after initial meeting; include Summary Sheets; assign FOLDER NO.; enter First Meeting Date on CHART.
2. Notify Site Survey personnel of need for site survey for a specific FOLDER NO.
3. File Wang Cost Form from Wang Marketing in folder.
4. Edit 88 or 2420 checking Wang Cost Form, and blueprints which should both be in folder; enter FOLDER NO. on 88 or 2420, file copy of corrected 88 or 2420 in folder, (88 or 2420's without sufficient funds are returned to customer).
5. Give 88 or 2420 to equipment tracking personnel for entry into computer database
6. File Contract Order from Chief, WPB/ODP in folder; enter Contract Order Date and Expected Delivery Date on CHART.
7. Coordinate pre-install meetings with Wang Support personnel; enter Pre-install Date on CHART.
3. File Receiving Form from Chief, WPB/ODP in folder.

SITE SURVEY PERSONNEL

1. Assist customer in drawing up blueprints (4 copies); indicate FOLDER NO. on blueprints; file one copy in folder.
2. Perform site survey with Wang subcontractor referencing FOLDER NO. ; enter Site Survey Date on CHART.
3. Notify OL to do power survey for HQS orders; submit power request for outlying buildings; track power request dates and power installation dates.
4. Notify customer of cabling costs after Wang selects subcontractor.
5. Edit cabling 2420; file copy of 2420 in FOLDER and give 2420 to equipment tracking personnel.
6. Enter Cable Installation starting Date on CHART.
7. Perform cable inspection; notify equipment tracking personnel of site readiness; file subcontractor's copy of blueprints in the folder.

WANG MARKETING

1. Accompany systems analyst to initial meeting; provide pre-order customer support; coordinate customer order status with systems analyst.
2. Draw up Wang Cost Form; include equipment and maintainance costs; send copies to customer and appropriate systems analyst.
3. Provide follow-through with customer after equipment is installed.

CHIEF, WPB/ODP

1. Give 88 or 2420 to Systems Analysts (or site survey personnel if cabling 2420).
2. Mark FOLDER NO. on Contract Order and give original copy to Wang Marketing and remaining copies to Secretary for distribution.
3. Fill out approval form and give to secretary to file.
4. Give xerox copy of Contract Order to Systems Analysts.
5. Give Receiving Form to Systems Analysts



### EQUIPMENT TRACKING PERSONNEL

1. Enter 88 (or 2420) from Systems Analysts or Site Survey Personnel in computer database.
2. Give 88 (or 2420) to Contracting Officer to draw up contract order.
3. Enter Contract Order into computer database (routed from secretary).
4. Enter Shipping Date on CHART (received via phone from Lowell); Notify customer of anticipated delivery; request to be notified when equipment is delivered; inquire about site readiness.
5. Enter delivered equipment data into computer database and Delivery Date on CHART (from depot receiving form).
6. Give receiving form to C/WPB/ODP.
7. Request installation from Wang (Atlanta) after customer requests installation.
8. Enter Installation Date and equipment serial numbers from Wang C.E.'s on computer database; enter Installation Date on CHART.
9. Generate listing of equipment serial numbers for Maintenance Management Branch to tag equipment.
10. Enter Begin Acceptance Date From Wang C.E.'s acceptance forms in database and on CHART.
11. Determine acceptance status from reports generated by Maintenance Branch.
12. Enter Acceptance Dates in database and on CHART.
13. Produce regular statistical reports on orders-in-process, equipment-received, maintain record, etc.

CONTRACTING OFFICER

1. Draw up contract order from 88 (or 2420).
2. Give Contract Order to C/WPB/ODP with attached 88 (or 2420).

SECRETARY

1. Distribute copies of Contract Order to the appropriate offices; Copy 3 of Contract Order should be routed to equipment tracking personnel before filing in Contracting Officer files.
2. Make two xerox copies of Contract Order and give to C/WPB/ODP
3. Send 88 (or 2420) to OL, Supply Division.
4. Record Contract Order number and folder no. on Word Processor file.
5. File approval form in folder.
6. Close out 88 or 2420 on computer database.

Items To Be Included In Folder

1. Summary Sheets
2. Blueprints
3. Wang Costs Forms
4. Justification
5. 88 (or 2420)
6. Approval Form
7. Contract Order
8. Receiving Form